

# NDA & Secure File Preparation Checklist

Checklist for sharing sensitive EOAT CAD before full supplier selection

OPERATIONAL CHECKLIST - NOT LEGAL ADVICE

## Purpose

Use this checklist before sending proprietary CAD, customer product geometry, unreleased tooling details, or cell-layout information. Formal legal terms should be reviewed by your legal team.

## Before Sharing Full CAD

- Decide whether a mutual NDA is required before native CAD or full assembly files are shared.
- Use redacted drawings or simplified envelopes for early manufacturability discussion.
- Remove customer names, product launch codes, and confidential end-customer marks when possible.
- Mark the email subject and file names with confidentiality requirements.

## Suggested First Email Fields

Project name	Neutral internal code or project alias
Confidentiality level	Redacted / NDA required / full package approved
File types	STEP, IGES, PDF drawing, native CAD if approved
Allowed review scope	DFM only / quote / sample production / repeat order
Photo restrictions	Allowed / restricted / approval required before sharing

## Buyer Notes

- Send your company NDA format if your legal team requires a specific agreement.
- Share photo rules before FAI if sample images are sensitive.
- Tell us if project codes, customer names, or logos must not appear on WIP labels or reports.